

Case Study

Professional Services ·
Audit, Tax & Advisory

BIG 4 PROFESSIONAL SERVICES FIRM

COMPANY OVERVIEW

A Big 4 professional services firm spanning audit, tax and advisory, gathering its partners for a two-day strategy event on the future of the firm.

CHALLENGE

Earlier speakers had already made the case for AI disruption. Partners needed a working picture of what comes next: leading blended teams, redesigning services and the skills that set people apart.

SOLUTION

40-minute keynote

SuperCollaboration™: How To Thrive When The Rules Have Changed, followed by a speaker panel and partner breakout groups.

AUDIENCE

Around 140 long-tenured partners from audit, tax and advisory.

LOCATION

Dublin, Ireland

RESULTS

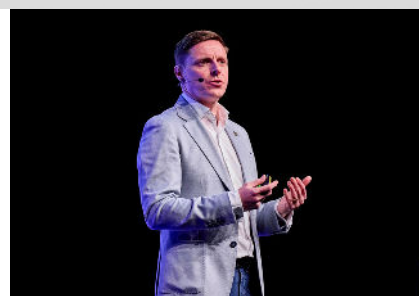
Partners left with a shared vocabulary for the change and a 30-day personal starting point. The client valued most James staying on to work with partners in the afternoon breakouts.

Deloitte.

pwc

EY

KPMG



How a Big 4 Professional Services Firm Turned the Case for AI into a Working Picture of Human + AI Collaboration

ABOUT THE ENGAGEMENT

A Big 4 firm brought around 140 partners together for a two-day strategy event. The room was technically expert and used to working from evidence, data and precedent. A business built on advice and judgement is exposed when clients can ask an AI first. At a leadership dinner the night before, one managing partner summed up the mood: chaos is hard to profit from, but seismic change creates real opportunity. The firm wanted partners to leave optimistic as well as aware, and to see the redesign of services and teams as their own work rather than a firm-wide programme to wait for.

The Preparation

- **Pre-event briefing call** and a close reading of the client's brief.
- **Iterative drafts** — client feedback shaped the title, examples and running order.
- **Built to follow on from** the morning's earlier speakers, not repeat them.
- **Profession-specific example** — James rebuilt his AI prediction-engine story around a tax restructuring.

The Delivery

The keynote opened with curiosity and Nobel laureate Linus Pauling's beret, then anchored the room in what will not change, borrowing Jeff Bezos's habit of building around constants. It moved through the 4Cs (collaboration, creativity, critical thinking and communication), with the emphasis on collaboration, backed by evidence on Pilot Purgatory, the Competency Penalty and the Cyborg and Centaur working styles. A Klarna vs IKEA contrast showed the same technology producing opposite workforce outcomes, depending on whether AI was used for efficiency or for redesign. The tax-restructuring prediction engine tested a client's position against thousands of simulated stakeholders before it reached a real boardroom, and the session closed with the Three Lists method. James then joined the panel and stayed for the afternoon partner breakouts on what an AI-redesigned business and workforce could look like.

The Result

REDESIGN OVER EFFICIENCY

The Klarna and IKEA contrast gave partners a clear way to frame AI as a redesign of what the firm does, not just a faster route to the same work.

A PERSONAL STARTING POINT

The Three Lists method gave each partner a 30-day first step for their own working week.

LEADING MIXED TEAMS

The Cyborg and Centaur models gave partners a working picture of leading teams that combine onshore, offshore and AI agents.

CONVERSATION, NOT BROADCAST

Staying for the breakout groups carried the ideas off the stage and into the partners' own working sessions, the part the client valued most.



SuperCreativity:
Accelerating Innovation in the Age of
Artificial Intelligence

**Creativity is no longer optional. It
is fast becoming the defining
human advantage.**



James
Taylor

KEYNOTE SPEAKER

About James Taylor

James Taylor is an award-winning entrepreneur, author, host, and inspiring keynote speaker on a global mission to unlock creativity, increase productivity and accelerate innovation.